

Assignment Change Request Task Order
Task 1 - Scope

Version 1.5

Document History

DOCUMENT LOCATION

Ensure that this document is current. Printed documents and locally copied files may become obsolete due to changes to the master document. The source of the document is located in the project's documentation repository in Clear Case *Apps/OneView/Docs/8.project_mgmt* folder.

REVISION HISTORY

Version Number	Revision Date	Author	Summary of Changes
1.0	9/24/05	D. Fox	Initial Version
1.1	09/26/05	D. Fox	Incorporated Comments from Lana Diggs
1.2	09/26/05	D. Fox	Changed Confirmation Page screen shot to reflect the UI update to make the request type bolder and bigger.
1.3	09/28/05	D. Fox	Corrected links to referenced documents within the Requirements Table.
1.4	10/05/05	D. Fox	Updated to reflect the change of Scope to include OneView integration with Web QT.
1.5	12/14/05	N. Globus Martin	Added architecture documents mapping

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1 Introduction

The purpose of this document is to document the functional scope of the Task 1 portion of the Assignment Change Request Task Order.

A secondary goal of this document is to provide a detailed map to the requirements documentation that covers the functionality within the scope of Task 1 release.

2 Objective of Task 1

The Assignment Change Request Task Order spells out the objective to allow NIH community to have a completely electronic Form 901 process. Details of the entire scope are covered in the Assignment Change Request Vision Document.

The first iteration of this Task Order (what's known as Task 1) spells out the non-production release of software that has the following functionality:

- a) Ability to log in to OneView and Navigate to the Web QT Application within the OneView.
- b) Ability to locate a grant application in order to submit Assignment Change Request.
- c) Ability to fill out the Assignment Change Request Form.
- d) Ability for the System to validate various business rules to accept the Assignment Change Request Form.
- e) Ability for the System to process the submitted form and apply business rules to the grant application.

Following sections within the document cover the detailed list of steps and pointers to the requirements to complete the above set of goals.

3 Details

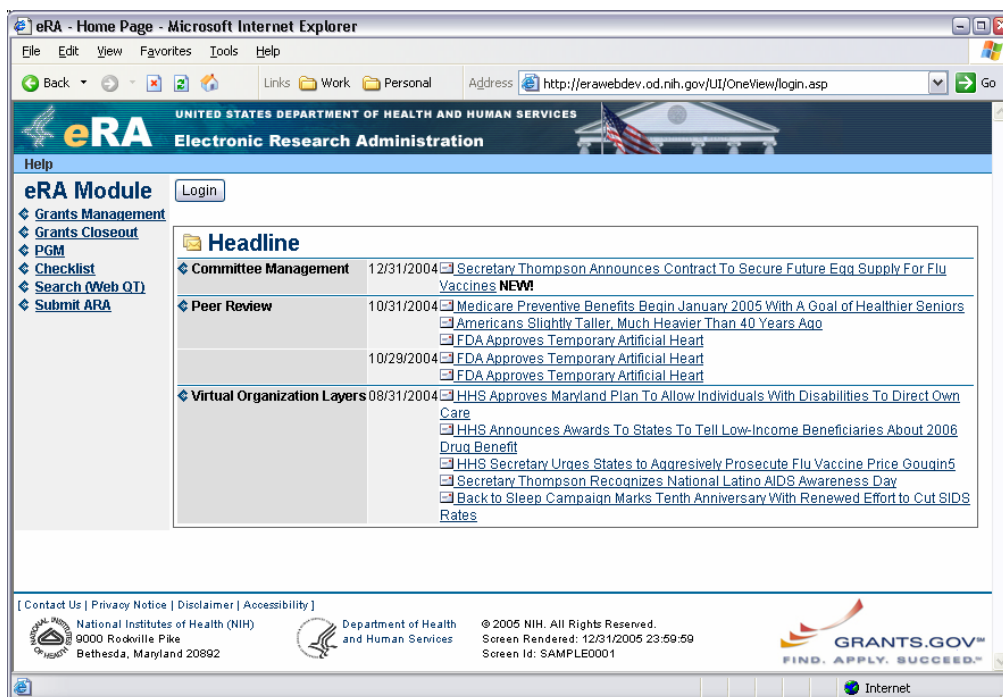
3.1 Locate Grant Applications and Submit the Form

Web QT is a current eRA System that allows users to search for grant applications. This system needs to be enhanced to allow users to submit Assignment Change Request Form. Additionally, this system needs to be available within the eRA OneView, so that user can log into OneView and navigate to Web QT.

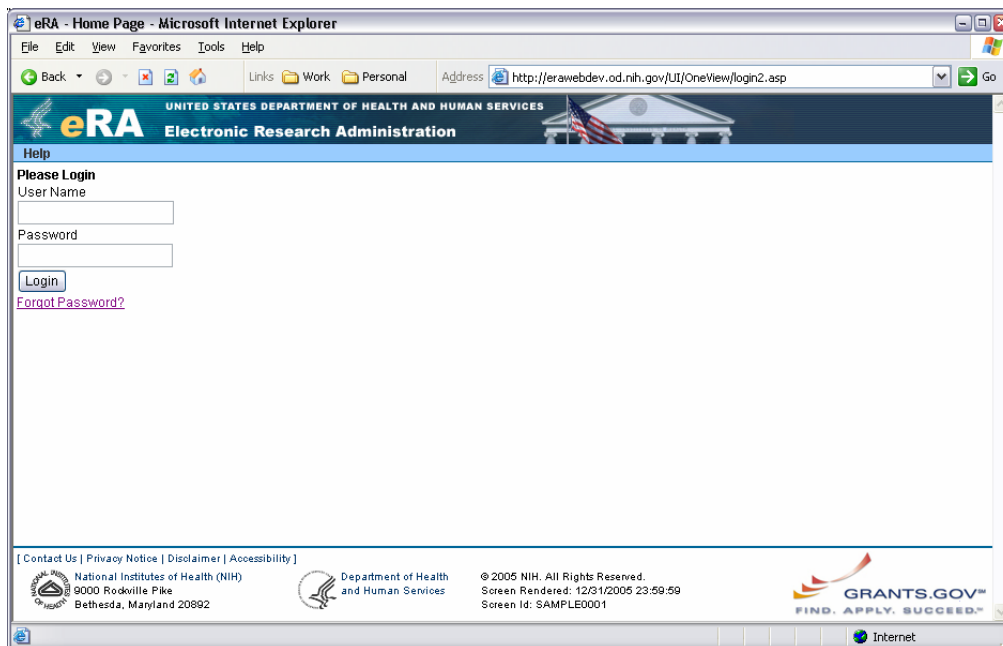
Here is how it will work.

1. User will log in to OneView. Note that to log in user needs a valid eRA IMPACII account with which he/she can log in to current Production Web QT system (http://apps.era.nih.gov/webqt/displayWebQT.do?menu_itemPath=Basic+Search). Here is a screen shot of the OneView Log In screen:

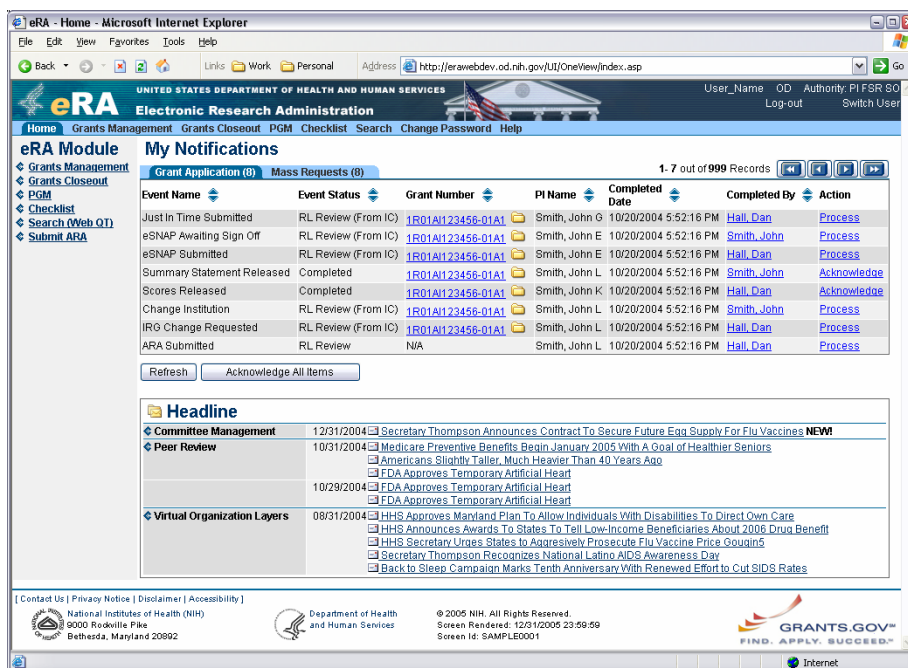
User navigates to OneView Home Page and clicks the Login Button:



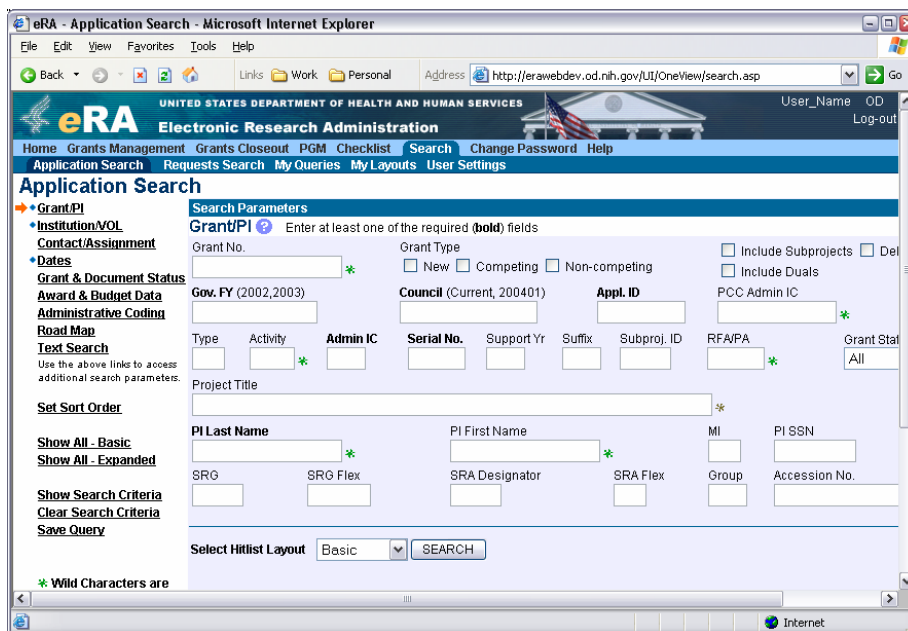
The following page is displayed to allow user to enter user name and password:



Right after the successful login the following Home Page is displayed:



2. User clicks on the Search menu item, the screen below is displayed. Users can perform a Search for Grant Applications by filling out the Search Parameters on Basic Search page and clicking the Search button:

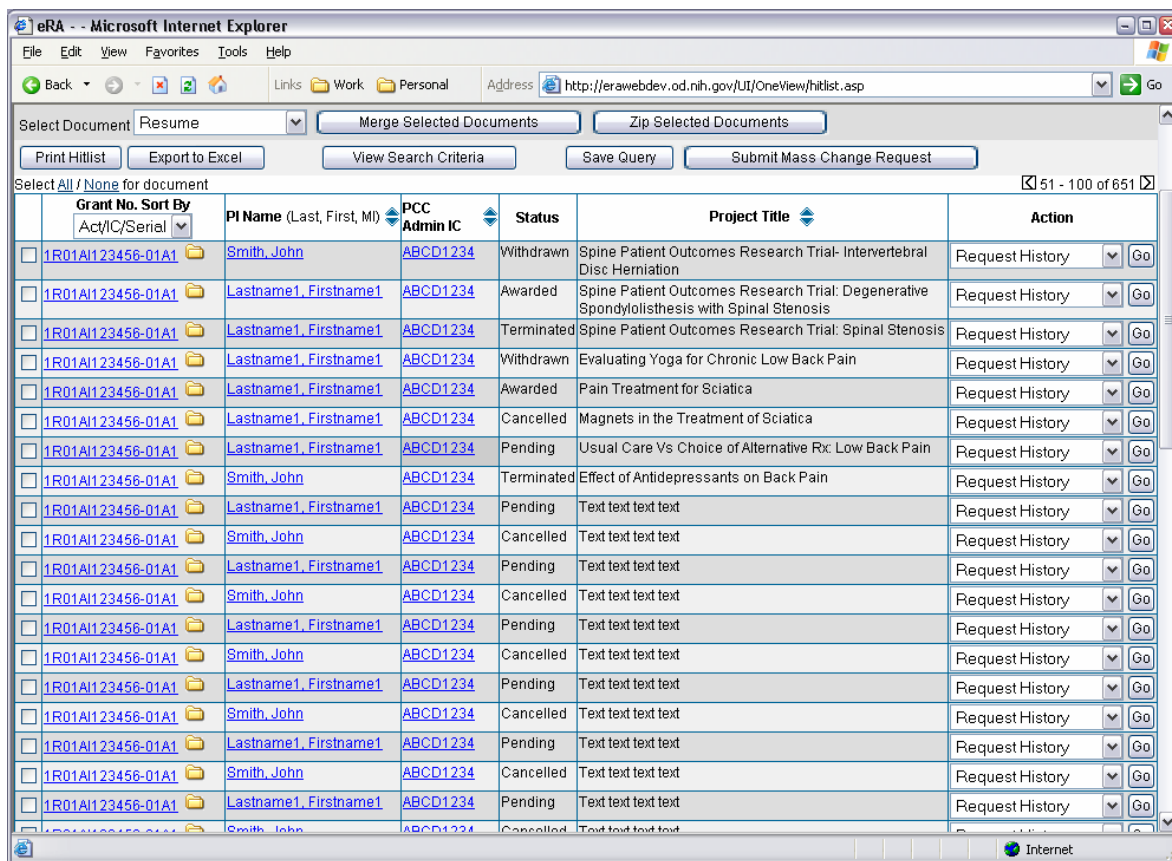


3. Once query executes, the user will be taken the Basic Hitlist Screen with Results of the Search displayed to the user:



Note: The above screenshot represents existing Production state of the Web QT System.

Below screen shot will illustrate the change to the system to support the ability to submit Assignment Change Request Form:



4. User selects Change Assignment option within a new Action item within the hitlist and clicks the Go button. An Assignment Change Request Form (covered in the next section of this document is presented to the user).

Note: The Action column within the Basic Hitlist is new requirement.

3.2 New Assignment Change Request Form Submission

Here are the steps to submit the Form:

1. System presents user an Assignment Change Request Form

The screenshot shows the 'eRA - Request Assignment Change' form in a Microsoft Internet Explorer browser window. The address bar shows the URL: <http://erawebdev.od.nih.gov/UI/OneView/submitChange.asp?action=Request%20Assignment%20>. The form is titled 'Enter New Information' and includes several input fields: Grant No. (1), Type (R01), Activity (AI), Serial No. (123456), Support Year (01), Suffix (A1), Council (200501), and Dual Council (200501). There are also checkboxes for 'Generate New Grant Number' and 'Retain Review Outcome'. Below these are fields for IRG (ZRG1), SRA (PC), Flex (1), Group (01), and Ext. (SRC(99)). A 'Background/Justification' text area is present, along with a 'Submit Supporting Documents' section with a 'Browse...' button and an 'Upload' button. A table of 'Submitted Supporting Documents' is shown at the bottom right, listing three documents uploaded by 'Hall, Dan' on 12/31/2004. At the bottom of the form are 'Continue' and 'Cancel' buttons.

2. User fills out the form and clicks Continue button
3. System validates the form data as entered by the user and presents user with a Confirmation Message.

The screenshot shows the 'eRA - Assignment Change Request' confirmation form in a Microsoft Internet Explorer browser window. The address bar shows the URL: <http://erawebdev.od.nih.gov/ui/OneView/changeAssignmentConfirm.asp>. The form is titled 'You are requesting: Grant No. Change'. It displays a table with the requested change: From: 1 (R01, AA, 111111, 1, A1) to To: 1 (R02, BB, 111111, 1, A1S1). Below this is a 'Warning Message, if any' section, followed by a 'Background/Justification' text area. A table of 'Submitted Supporting Documents' is shown at the bottom right, listing three documents uploaded by 'Hall, Dan' on 12/31/2004. At the bottom of the form are 'Submit' and 'Cancel' buttons.

4. User elects to proceed with Submission and clicks the Submit button (note that if user clicks Cancel, he is taken back to the Assignment Change Request Form with Data filled in as when he clicked Continue on that form)
5. System accepts the form, applies the data to the Workflow specific eRequest tables to store the request information.
6. System then applies the data updates to the Grant Application for which the form is being submitted and takes the user back to the Web QT - Basic Hitlist (back to where user came from to the Assignment Change Request form).

Note: Based on user feedback on pilot, a confirmation page that form was processed successfully may need to be added to the system.

3.3 Error and Warning message locations within the UI

1. Error Messages should appear on the top of the Form and user should be allowed to correct form data and submit again.
2. Warning messages will appear on the Confirmation Page to allow user proceed if user deemed that Warning message is acceptable.

4 Requirements/ Implementation Mapping

To accomplish the above goals, the Web QT system must be modified to allow user to submit the Assignment Change Request Form. Below table outlines changes to the Web QT system and corresponding documentation location which outlines detailed requirements:

Description of Functionality	Requirement Document	Document Location	Architecture Document	Document Location
Behavior of the user/system to submit the Assignment Change Request form from Web QT	Web QT – Run Query Use Case Extension Point – Submit Request	ReqPro\eRA Project\SubSystem Requirements\Web QT\Use-Cases	QTEngine modifications recommendations document.	j2ee_internal\webqt\docs\3.analysis&design\architecture
Provide Action Item on Basic Hitlist	Web QT – Query Sort and Hitlist Data Document Basic Hitlist Fields	ReqPro\eRA Project\SubSystem Requirements\Web QT\Supplementary	n/a	
Rules that govern which user sees which Action Items within the Action Drop Down	Web QT – Supplementary Specification Actions for Initiating Requests section	ReqPro\eRA Project\SubSystem Requirements\Web QT\Supplementary	QTEngine modifications recommendations document.	j2ee_internal\webqt\docs\3.analysis&design\architecture
Fields on the Assignment Change Request Form and Rules which govern the display of these fields based on user role; also, the valid values...	eRequest – Supplementary Specification User Interfaces\ Business Area Interfaces\ Assignment Change Request Form	Clear Case\ Apps\ OneView\ \docs\Requirements\ SupSpec\	n/a	
Behavior of the System when user clicks Submit button on the Assignment Change Form	eRequest – Determine Request Type Use Case eRequest – Supplementary Specification: Business rules\ Workflow State Rules and Display Requirements\ Determine Request Type section Business Rules\ ACR, Withdraw, Delete, Reinstate, and ARA Specific Business Rules\ Post Determine Request Type Authorization Rules and Submission Authorization Sections	Clear Case\ Apps\ OneView\ \docs\Requirements\ Use-Cases\ Clear Case\ Apps\ OneView\ \docs\Requirements\ SupSpec\	Rule Engine Technical Evaluation	teams\architecture\docs\RuleEngines
Validation Rules when user fills out the form as clicks Submit button	Grant Data Validation Document Grant Data Validation and Dual IC Validation Sections	Clear Case\ Apps\ OneView\ \docs\Requirements\ SupSpec\		
Processing Rules when system accepts the Form, Form passes Validations, and	TBD	TBD	Post Process tables diagram and the elaboration result prototype code.	Apps\OneView\docs\3.analysis&design\design

System is ready to apply the data changes to the Grant Application				
Design Constraints about the Storage of the Request Data	eRequest – Supplementary Specification Design Constraints\ Assignment Change Request, Withdrawals, Reinstatements, and Deletion Storage Section	Clear Case\ Apps\ OneView\ \docs\Requirements\ SupSpec\	n/a	

5 Assumptions

1. Within Web QT only Change Assignment Action will be added for the first release, but Action column should still be a drop down, as more items will be added later.
2. Since changes to User Admin will not be made within Task 1, the IRG Chief and Referral Liaison user roles will not exist in the system thus can not be supported within Task 1. However, provisions in the coding of the system must be made to allow for easy inclusion of these roles into the logic once these roles can be added to user accounts within the User Admin system.
3. Submit Mass Request functionality, while button is shown on the screen shot above, will not be implemented within Task 1.
4. While all fields on the Assignment Change Request Form will be available for entry within the Task 1, only following Request Types can be submitted (note, all other request types not specified below will result in "Invalid Request – Not Supported in this Pilot" message):
 - a) Grant # (Including IC) Change
 - b) Grant # (Excluding IC) Change
 - c) Dual IC Change
 - d) Grant # (Including IC) and Dual IC Change
 - e) Grant # (Excluding IC) and Dual IC Change
5. The status of the grant application may change while user is sitting on the Basic Hitlist with that grant application. By this time, system already figured out that user may or may not submit the Assignment Change Request Form for this grant application. It is assumed that the change of the grant application Status while user is sitting on the Basic Hitlist will not be supported, and to see a change in application status and possibly appearance or disappearance of the Change Assignment option within the Action item, user needs to refresh the Basic Hitlist page by re-querying on the Hitlist.
6. The Application Information, Detailed Status, View Comments, and Submit Supporting Documents portions of the Assignment Change Request Form outlined within the UI prototype and requirements will not be implemented within Task1.
7. eNotifications will not be built in Task 1.